mitto

HUBSPOT OMNICHANNEL COMMUNICATION ONBOARDING GUIDE

Powered by Mitto
Add SMS, WhatsApp, and Viber messaging to HubSpot with Mitto's tailored SMS and chat app integrations.

Before you start, make sure you:

1. Have a Mitto account and API key
2. Have a HubSpot Professional or Enterprise account
3. Know which channels you want to use: SMS, WhatsApp, Viber

⚠️ **Note:** WhatsApp requires template approval and a verified business phone number.

☐ STEP 1: DISCOVERY & CHANNEL SETUP

- Choose which channel(s) to enable: SMS, WhatsApp, or Viber
- Get expert advice on campaign use cases, audience targeting, and workflows
- Discuss template needs and use cases

☐ STEP 2: INTEGRATION SETUP

- Install Mitto Global SMS or Mitto for WhatsApp and Viber from the HubSpot Marketplace
- Add your Mitto API Key to connect your account or try sending SMS for free with Mitto's self-service signup.
- Our team supports you in configuring sender IDs and channel settings

☐ STEP 3: TEMPLATE APPROVAL

- Submit pre-approved message templates
- Templates approved via Mitto's API
- Meta approval time: ~2 hours
- Use rich media, buttons, and variables to enhance engagement

☐ STEP 4: TESTING & LAUNCH

- Send test messages
- Ensure workflows and triggers are firing properly
- Start sending live messages to your contacts
- Track message activity in the contact timeline to monitor delivery, content, and responses.

☐ YOU'RE LIVE

Once completed:
✅ Integration is active
✅ Templates are approved
✅ Workflows are configured and on

You're ready to meet your customers where they are —with messages that matter, exactly when they need them.

MAIN CAPABILITIES AFTER SET UP

- Add messaging directly into HubSpot workflows using native action blocks
- Run one-way bulk campaigns or engage in two-way conversations
- Personalize messages with HubSpot fields and dynamic content

Need help?
Our team is here for you at every step—from setting up templates to planning campaigns and scaling with confidence.